



STATE OF MONTANA DEPARTMENT OF REVENUE JOB PROFILE

Working Title

Payroll and Benefits Specialist

Job Code Title

Payroll Technician

Pay Band

04

Job Code Number

433514

Director's Office

Office of Human Resources and
Organizational Development

Fair Labor Standards Act

Non-Exempt

The Montana Department of Revenue administers more than 30 state taxes and fees; establishes values for taxable property, including agricultural land, residential real estate, commercial real estate, forest land, business equipment, railroads and public utilities; supervises the operation of the state liquor stores and agencies and administers the laws governing the sale, taxation, and licensing of alcoholic beverages; and returns unclaimed property to its rightful owners.

The Director's Office supports the agency's Director and is composed of five work units: Legal Services Office; Office of Tax Policy and Research; Office of Human Resources and Organizational Development (HR); Office of Taxpayer Assistance; and the Executive Office. The Office of Human Resources is responsible for a variety of human resource duties including organizational and workforce development, employee and labor relations, staffing, employment law, performance management, compensation, and training and development.

Job Responsibilities

The Payroll Technician processes and oversees all agency payroll transactions through the Statewide Accounting, Budget, and Human Resources System (SABHRS); provides employee benefits administration and technical assistance; and performs technical accounting. The position reports to the Human Resources Manager and does not supervise other agency personnel.

• Payroll 40%

1. Maintains and updates payroll information in SABHRS. Processes all changes for new hires, transfers, promotions, demotions, retirements, and terminations. Processes salary changes by completing change forms and changing the pre-payroll listing. Reviews payroll documents for accuracy of completion. Processes payroll information for active and newly hired employees.
2. Distributes all necessary forms and reports to payroll users. Reviews exception reports; verifies information by comparing internal records to SABHRS; and communicates with affected employees.
3. Processes and approves the biweekly payroll. Reviews and prepares pre-payroll for submission to the state's central payroll in the Department of Administration. Evaluates exceptions and ensures corrections are properly implemented. Compares paychecks and advice forms to payee totals to ensure that all employees get paid.

4. Corrects errors by researching files, correcting documentation, and communicating with affected employees. Researches and responds to employee questions or inquiries from administrators or supervisors on payroll matters by reviewing files and researching circumstances. Updates employee personal information as needed. Assists employees with self-service options.
 5. Monitors payroll activities to maintain agency compliance with SABHRS requirements; federal and state laws governing wages and employment; and employee leave administration policies and procedures. Responds to questions about state, federal, and agency policy and procedures and collective bargaining agreements.
 6. Provides reports and analyses for the administration of the department pay plan.
- **Benefits 40%**
 1. Provides benefit information to new employees at point of hire, existing employees upon request, and during yearly informational updates such as annual change. Answers routine and non-routine questions, researches individual circumstances, and responds in a timely manner.
 2. Enrolls all department employees in benefits by completing forms and properly calculating, preparing, and verifying all premiums and changes to ensure accurate and consistent coverage.
 3. Provides technical assistance and information to department employees, dependents, retirees, and former employees over the phone, in writing, and in person. Explains and interprets benefit information relating to health/dental insurance, life insurance, employee assistance program, prescription drug program, vision program, Public Employee Retirement System (PERS), deferred compensation plan, workers' compensation, and the state's wellness program. Provides technical assistance and information to department employees on the sick leave fund and direct sick leave grants.
 4. Maintains and tracks employee benefit balances such as compensatory time, Family and Medical Leave Act (FMLA), annual leave, and sick leave through SABHRS. Responds to questions from employees and supervisors, reviews files, researches individual circumstances, and responds in a timely manner.
 5. Reviews annual leave and exempt compensatory time reports according to the Montana Operational Manual (MOM) policies and procedures. Monitors excess annual leave and exempt compensatory time hours. Notifies employees and supervisors of excesses and when those hours need to be used.
 6. Collects insurance premiums from eligible retired employees and from employees on leave-without-pay in order to maintain their group coverage.
 7. Audits sick and annual leave records and computes leave time for termination payouts and employee transfers by reviewing records and calculating time.
 - **Personnel Services Support 15%**
 1. Incumbent provides specialized support for the Office of Human Resources.
 2. Participates in meetings and conferences.
 3. Attends and provides on-going training and professional development activities.
 4. Coordinates and carries out special projects.
 5. Provides unions with employee lists and responds to questions.
 6. Manages retention and disposal of payroll and personnel files.
 7. Queries SABHRS to answer questions and compile reports.
 8. Maintains the office supply and equipment inventories; requisitions office supplies, forms, and equipment when requested; and tracks purchasing records.
 - **Other Duties as Assigned 5%**
 1. Performs other duties as assigned by the supervisor.

Job Requirements

To perform successfully as a payroll technician, the incumbent must be self-motivated; possess a strong work ethic; maintain a positive attitude; and enjoy working with, and for, the public. Skills in multi-tasking; paying attention to details; accuracy; managing multiple priorities under tight deadlines; mathematics; providing timely and effective written, verbal, and interpersonal communication; customer service; conflict resolution; compiling and analyzing data from multiple sources; following written and oral directions and instructions; researching data to identify and resolve a wide variety of problems and issues; and word processing, spreadsheet, and database applications are required. Incumbent is required to exercise discretion and judgment in handling confidential and sensitive information.

This position requires knowledge of payroll and accounting systems; payroll and benefits administration; benefits plans; technical accounting and auditing procedures and guidelines; applicable federal and state statutes including FMLA and Fair Labor Standards Act (FLSA); administrative rules; state and departmental policies and procedures; and office procedures.

- The minimum level of education and job-related work experience needed as a new employee **on the first day** of work is a high school diploma or GED and three years of job-related work experience.
 - Work experience should be made up of accounting, payroll, and benefits experience.
 - Post-secondary training in accounting, bookkeeping, payroll, or benefits preferred.
 - Other combinations of education and experience will be evaluated on an individual basis.

Department Core Values

- **Respect:** As a representative of the people of Montana, proceeds with the highest level of respect for the dignity of every person contacted through work. Without exception, all people are treated as equally as possible. The employee is a faithful steward of the resources provided to this agency by the citizens of Montana.
- **Integrity:** Conducts work honestly and makes decisions that establish a clear record that the department serves the public with integrity. Apologizes for mistakes and gives credit to others for their cooperation, work, and ideas in achieving positive results. Accountable for their actions and holds others accountable for theirs. Decisions and judgments achieve equity and justice for all parties involved including citizens and co-workers.
- **Productivity:** Consistently strives to minimize the waste of the department's financial, facilities, and human resources. Diligently works to improve the productivity and effectiveness of the work unit. Welcomes and encourages new ideas on improving the results of the department from the public, other officials, colleagues, and supervisors. Approaches work in a manner that builds goodwill, trust, and cooperation internally with other staff and externally with the public.
- **Teamwork:** Maximizes cooperation and teamwork when working with other employees, divisions, and other state agencies. Willing to work with others for the opportunity to learn from their ideas, talents, and knowledge. Seeks to resolve conflicts with other employees and work units in an open and respectful manner that reinforces teamwork. Celebrates the successes of others.

Working Conditions

Considerable mental stress and pressure due to issues, workload, deadlines, controversial or adversarial situations, conflicting priorities, and significance of decisions made. The ability to work in an office setting with noise distractions and frequent interruptions is required. As a Department of Revenue employee, the incumbent may come into contact with highly confidential financial and tax information and is required to maintain the highest level of confidentiality regarding all information acquired or used in performing this job. This position requires considerable computer and keyboard use. May spend considerable time on the phone. Lifting is infrequent, less than 15 pounds and includes carrying light items such as papers and books. This job requires regular attendance as scheduled by the supervisor. This job cannot be performed at an alternate work site.

Special requirements

- Background Examination: Applicants for this position will be subject to a criminal background review before being considered for employment. Individual circumstances involving a criminal conviction will be reviewed to determine an applicant's eligibility for employment.
- Compliance with All Appropriate Montana Tax Laws: An employee's tax status must be current.

This job profile was produced by the Office of Human Resources in conjunction with the appropriate managers.

Human Resource Manager Review: The statements in this job profile are accurate and complete.

Signature: James Fehr, Human Resources Manager Date: August 2010

Human Resource Director Review: The Office of Human Resources has reviewed this job profile.

Signature: JeanAnn Scheuer, Human Resource Director Date: August 2010

Employee: My signature below indicates I have read this job profile and discussed it with my supervisor.

Signature: _____ Date: _____

Name (print): _____